Case Study Number 1:

**Sylvia Light’s Retirement Portfolio Proposal**:

|  |  |  |
| --- | --- | --- |
|  | Total Amounts: | Allocated funds: |
| **Individual Retirement Account (IRA):** | $78,000 | $78,000 |
| **Certificate of Deposits**: | $234,000 | $42,000 |
| **Checking Account**: | $3,500 | $3,500 |
| **Annuities**: |  | $110,000 |
| **Municipal Bonds**: |  | $45,000 |
| **Stock Funds**: |  | $37,000 |
| **Grand Total**: | $315,500 | $315,500 |
|  |  |  |

Case Study Number 2:

I chose the bar chart because it clearly shows the sheer amount of how much correspondence is done via technology rather than physical letters. The bar chart was nice in the fact that it showed both visual lines and the exact numbers of data.